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Practitioner Research for Organizational Knowledge

Mechanistic- and Organistic-oriented Approaches to Insider Action Research

Abstract *Insider action research is a relatively neglected form of research on organizations. Insider research is valuable because it draws on the experience of practitioners as complete members of their organizations and so makes a distinctive contribution to the development of insider knowledge about organizations and organizational change. We are all insiders in our own families and organizations and a distinctive quality of knowledge generalizable to that experience can come from insider action research. Within insider research, action research has a particular contribution to make to organizational research as it generates useful knowledge about how organizations manage change and how key actors perceive and enact their roles with regard to change. Two distinct patterns within action research may be seen. Mechanistic-oriented action research encompasses traditional action research as expressed in organization development and participatory action research, leading to pragmatic outcomes such as the management of change or problem resolution. Organistic-oriented action research is more complex and subversive because it is guided by a primary aspiration to study the inquiry process and help it transform through increasingly intensive learning in action. **Key Words:** action research; insider action research; mechanistic-oriented action research; organistic-oriented action research; practitioner research*

As organizations work at enabling, developing and consolidating their production of knowledge in order to enhance their capacity and capability for learning (DiBella, 2001), ways in which this knowledge may be produced and understood are worthy of consideration and exploration. Academic research is increasingly criticized for being too narrow and removed from the concerns of practising managers (Lowendahl and Revang, 1998). As the growing dissatisfaction and unease with the dominance of positivism in organizational research have led to the articulation and exploration of alternatives, it is appropriate and useful to reflect on insider action research as a relatively neglected form of research on organizations.

Insider research is valuable because it draws on the experience of practitioners as complete members of their organizations and so makes a distinctive contribution to the development of knowledge about organizations. We are all insiders in many systems—our own families, communities, organizations and associations. As members we play active roles in the development of these systems, e.g. in child rearing, or in enabling the organization to function and fulfil its goals.

There are several levels at which we can participate and inquire into our experience (Torbert, 1999, 2001; Sherman and Torbert, 2000; Fisher et al., 2000). Through first person research/practice we can reflect on our own values and assumptions and how we behave. Through second person research/practice we can engage in inquiry with others and can work to create a community of inquiry. Through third person research/practice we can move beyond immediate first and second person audiences to the impersonal wider community and make a contribution to the body of knowledge of what it is really like in these systems and how we can learn better change management while in the middle of it.

Within insider research, action research has a particular contribution to make to organizational research as it generates useful knowledge about how organizations manage change and how key actors perceive and enact their roles with regard to change. Although action research as a whole is relatively organic compared with positivist research, we can also divide action research itself into a more mechanistic and a more organistic variant. Mechanistic-oriented action research encompasses traditional action research as expressed in organization development and participatory action research, leading to pragmatic outcomes such as the management of change or problem resolution. Organistic-oriented action research is more complex and subversive because it is guided by a primary aspiration to study the inquiry process and help it transform through increasingly intensive learning in action.

In this article, I am reflecting on how action research conducted by insider practitioners can contribute to organizational knowledge. There are three main sections to this article. First, I will remind readers of the main tenets of the action research tradition and identify mechanistic- and organistic-oriented strands. Second, I will reflect on insider research. Third, I will explore the relatively neglected subject of insider action research in terms of mechanistic- and organistic-oriented approaches.

Action Research

Action research has been traditionally defined as an approach to research that is based on a collaborative problem-solving relationship between researcher and client, which aims at both solving a problem and generating new knowledge. It developed largely from the work of Kurt Lewin and his associates, and involves a cyclical process of diagnosing a change situation or a problem, planning, gathering data, taking action, and then fact-finding about the results of that action in order to plan and take further action (Lewin, 1946; Foster, 1972; Peters and Robinson, 1984; Argyris et al., 1985; Schein, 1987; Elden and Chisholm, 1993; Eden and Huxham, 1996; Greenwood and Levin, 1998; Gummesson, 2000; Reason and Bradbury, 2001). The key idea is that action research uses a scientific

approach to study important social or organizational issues together with those who experience these issues directly. The central tenets of action research have developed to become a family of approaches encompassing many different forms, each of which places emphasis on a different aspect of the process or of the client group or participating system (Brooks and Watkins, 1994).

For Gummesson (2000) action research is 'the most demanding and far-reaching method of doing case study research' (p. 116). He argues that action research always involves two goals: to solve a problem for the client, and to contribute to science. For Gummesson this means being a management consultant and an academic researcher at the same time; hence it is done in real time. It is particularly about understanding, planning and implementing change in systems; it aims at being holistic and so can recognize complexity; and it requires an applied pre-understanding of the corporate environment and of the conditions of the organization. In Gummesson's view, action research is interactive and requires cooperation between researcher and client and continuous adjustment to new information and events; it requires the total involvement of the researcher, and it operates from an ethical framework within any particular context and requires its own criteria for quality and rigour (Eden and Huxham, 1996; Reason and Bradbury, 2001).

Mechanistic-oriented and Organistic-oriented Approaches to Action Research

The terms 'mechanistic-' and 'organistic-oriented' research are found in Argyris' (1970) classic work on intervention theory. Argyris uses these terms to contrast what we might see as consultant-centred and client-centred consultation approaches. As action research is participative by nature, I have adapted the terms to reflect the direction in which an action research project is intended.

Some of the action research literature can be framed as a 'mechanistic-oriented' approach. By 'mechanistic' I mean that the action research is framed in terms of managing change or solving a problem—it is directed at confronting and resolving a pre-identified issue. In this approach, a system, such as an organization, group or community, has a problem or is embarking on a change process, and the action researcher engages in the action research cycle with the members of the system. Together, they name the issue, articulate a desired outcome, plan, take action and evaluate the action. Through their enactment of the action research cycles they work together at making the desired change or solving the problem, and articulating knowledge out of that experience. The issues may vary in complexity and may lead to first or second order change. The classic example of mechanistic-oriented action research is the case of the Harwood Company (Coch and French, 1948). The researchers were addressing the question of how to introduce change into the company where there was strong resistance to change. They set up two approaches to introducing the change—representative participation and total participation in discussing the implementation. Using these two approaches they were able to show the different effects each had on productivity and acceptance of the change. The results indicated that productivity increased at a faster rate and

further beyond previous levels in groups where total participation was used as a means of introducing the change.

First person research/practice in mechanistic-oriented action research focuses on the role of the action researcher in having the skills to work with client systems (Neilsen, 1994). Second and third person research/practice focus on actualizing how to be helpful to client systems in such a way that change is made and through which knowledge is generated (Schein, 1995, 1999a).

In many respects, traditional action research, as it has been practised in organization development (OD) is illustrative of the mechanistic-oriented approach (Schein, 1987, 1995; Cunningham, 1993; French and Bell, 1999; Gummesson, 2000; Coughlan and Coghlan, 2002). In a similar vein, the approach known as 'participatory action research' is also mechanistic (Whyte, 1991; Selener, 1997; Greenwood and Levin, 1998). These broad traditions of practice within action research focus on changing organizations as social systems.

Other forms of the action research literature contain examples of 'organistic-oriented' action research. By organistic, I mean action research projects in which the inquiry process is a value in itself (Schon, 1983; Marshall, 1999, 2001; Reason and Bradbury, 2001). As Reason (1996: 18) expresses it:

Human inquiry is simply good in its own right as an expression and actualisation of human capability and development of our capacity to inquire—into our purposes and values, into our individual and collective behaviour, into our life on the planet—and is to be celebrated and encouraged in its own right.

In an organistic-oriented situation, the participants themselves engage in an action inquiry process in which inquiry into their own assumptions and ways of thinking and acting is central to the research process. Marshall (2001) describes this first person research/practice in terms of (1) inquiring into the inner and outer arcs of attention, (2) engaging in cycles of action and reflection, and (3) being active and receptive.

Examples of the literature containing the organistically oriented approach are the action science work of Argyris (Argyris, 1993; Argyris et al., 1985) and the developmental action inquiry work of Torbert (1987, 1991, 2001; Fisher et al., 2000). In action science, participants, whether individuals or more complex systems, focus on how their actions (based on what Argyris calls 'theories-in-use') tend to produce defensiveness and undesired outcomes, the opposite of what is intended. This happens because we hold assumptions that govern our behaviour, and make private inferences and attributions about the motives and thought processes of others that we do not test. Accordingly, the core of the action science is learning how to identify the assumptions that govern behaviour and develop skills at testing assumptions and inferences, while at the same time exposing our own privately held theories to public testing. In Argyris' view such a process is central to organizational learning (Argyris and Schon, 1996).

In a similar vein, Torbert (1987, 1991, 1999, 2001; Fisher et al., 2000) develops the inquiry process by linking the ability to engage in the rigour of action inquiry with stages of ego development. As individuals advance through stages of ego development they may develop the skills that confront them at those stages. As Torbert (1999) illustrates, the goal orientation of the 'achiever' stage can evolve into the self-conscious responsiveness of the 'strategist' stage. In his view, it is in

the latter stages of development that individuals can engage in collaborative inquiry, whereby as they reflect on their behaviour-in-action, their behaviour towards others is such that it invites them to do likewise. Such behaviour has implications for the role of leadership and the use of power in creating communities of inquiry (Torbert, 1987, 1989). Organistic-oriented action research takes the primary focus away from practical outcomes and more on to what is being learned, and how the process of inquiry challenges values and ways of working and enacts a transformation of being (Reason and Bradbury, 2001). In this way it inquires into issues of professional practice at the individual level (Schon, 1983), and of culture at the level of a larger system (Schein, 1999b).

Quality in organistic-oriented action research is characterized by how the researchers articulate their intentions, values and assumptions, and how they illustrate how these are tested in action. Second and third person research/practice focus on facilitating reflection-in-action in others. Techniques such as the ladder of inference and the double-column (Argyris et al., 1985), and the four forms of speech (Torbert, 1999) are ways in which privately held inferences are publicly tested and refined through cycles of action and reflection.

While it may appear that the distinction between mechanistic- and organistic-oriented action research parallels distinctions between instrumental and transformational change, this is not what is intended. Mechanistic-oriented action research is indeed instrumental but it may lead to transformational change in a system. Organistic-oriented action research is not transformational in the sense of pre-identifying a transformation. Rather it focuses on the process of inquiry itself. In a similar vein it would be an oversimplification to equate mechanistic- and organistic-oriented research with single loop learning/first order change and double loop learning/second order change, respectively. Both approaches include both forms of learning and change; what makes the distinction between them is what is intended at the outset (Coghlan and Brannick, 2001). Mechanistic-oriented action research is driven by an instrumentalist approach to achieving planned pragmatic outcomes and generating usable knowledge. While organistic-oriented action research can also achieve planned outcomes, it is guided by a primary aspiration to study the inquiry process and help it transform through increasingly intensive learning in action. Of course one approach can lead into another as the emergent data in the mechanistic project open up the need for more organistic-oriented inquiry.

Insider Action Research

Action research is generally presented in terms of a professional researcher working with a client system to achieve intended outcomes. In this context the action researcher is conceptualized as the 'friendly outsider' (Greenwood and Levin, 1998). There is considerably less attention in the literature to situations where the action researcher is an insider to the client system. Hence, the focus of this article is on where the action researcher is a 'complete member' of the organization (Adler and Adler, 1987) and not one who joins the organization temporarily for the purpose of the research, as is common in ethnographic studies (Van Maanen, 1988). In insider action research the researcher is not only

concerned with studying some aspect of the organization, but with changing it (Coghlan, 2001; Coghlan and Brannick, 2001).

Insider research is characterized by the researcher being immersed experientially in the situation (Evered and Louis, 1981; Flyvbjerg, 2001). It involves researchers undertaking research in and on their own organization while a complete permanent member. Such researchers have an opportunity to acquire 'understanding in use' rather than 'reconstituted understanding'. As insiders, while the action researchers are familiar with their organizational setting they have to create the space and character for their research role to emerge. They need to learn how to look at the familiar from a fresh perspective and become open to discovering what they do not see and how their perspective is grounded in their functional role or occupational sub-culture. They need to develop relationships with people who they did not associate with previously, change the nature of pre-existing relationships with them, and become involved with the setting more broadly than they have hitherto in their functional role (Adler and Adler, 1987).

While many of the issues that face an external action researcher also pertain to the insider action researcher, there are three particular areas to which the insider action researcher needs to attend (Coghlan, 2001; Coghlan and Brannick, 2001): these are pre-understanding, role duality and organizational politics. These issues are well established in the consulting literature but tend to be less available in the research literature.

Pre-understanding

'Preunderstanding refers to such things as people's knowledge, insights and experience before they engage in a research programme' (Gummesson, 2000: 57). The knowledge, insights and experience of the insider action researchers apply not only to the theoretical understanding of organizational dynamics, but also to the lived experience of their own organization. Nielsen and Repstad (1993) outline some examples of such experience and pre-understanding. Insider action researchers have knowledge of their organization's everyday life. They know, at least implicitly, the everyday jargon; they know the legitimate and taboo phenomena of what can be talked about and what cannot; they know what occupies colleagues' minds; they know how the informal organization works and who to turn to for information and gossip; they know the critical events and what they mean within the organization, and they are able to see beyond objectives that are merely window dressing. When they are inquiring they can use the internal jargon and draw on their own experience in asking questions and interviewing, and be able to follow up on replies and so obtain richer data. They are able to participate in discussions or merely observe what is going on without others necessarily being aware of their presence. They can participate freely, without drawing attention to themselves and creating suspicion.

There are also some disadvantages to being close to the data. When insider action researchers are interviewing, they may assume too much and so not probe as deeply as they would if they were outsiders or ignorant of the situation—they may think they know the answer and not expose their current thinking to alternative reframing. Also they may find it difficult to obtain relevant data, because as a member they have to cross departmental, functional or hierarchical

boundaries, or because as an insider they may be denied deeper access, which might not be denied to an outsider. These pose considerable challenges to the insider action researcher and require rigorous introspection and reflection on experience, in order to expose underlying assumptions and unreflective action to continuous testing (Argyris et al., 1985; Nisbett and Ross, 1980). As Brookfield (1994) points out, such engagement in critical reflection provides the opportunity to gain insights into cognitive and emotional ebbs and flows of first person and second person inquiry and how such reflection contributes to transformative learning (Mezirow, 1991).

In order to meet the challenges of pre-understanding, insider action researchers may utilize other people as consultants, mentors or supervisors to provide feedback and help them reflect on their experience and learning. If the action research is part of a requirement for a degree, then the academic supervisor performs that role (Krim, 1988). Action researchers are sometimes members of a group that meets to provide support and shared inquiry in the manner of a cooperative inquiry group (Reason, 1999) or an action learning set (McGill and Beaty, 1995).

Role Duality: Organizational and Researcher Roles

When insiders augment their normal organizational membership role with the research enterprise, it can be difficult and awkward, and can become confusing for them. As a result, in trying to sustain a full organizational membership role and the research perspective simultaneously, they are likely to encounter role conflict and find themselves caught between loyalty tugs, behavioural claims and identification dilemmas (Ramirez and Bartunek, 1989; Holian, 1999).

Ramirez and Bartunek (1989) reflected on role conflict explicitly in their study of an insider action research project in a health care organization. They noted that the insider action researcher had to deal with the twin role of facilitating meetings while at the same time acting as a department head whose status was junior relative to other participants.

Managing Organizational Politics

Undertaking an action research project in one's own organization is political and might even be considered subversive. Action research examines everything: it stresses listening; it emphasizes questioning; it fosters courage; it incites action; it abets reflection; and it endorses democratic participation. Any or all of these characteristics may be threatening to existing organizational norms. While insider action researchers may see themselves as attempting to generate valid and useful information in order to facilitate free and informed choice (Argyris and Schon, 1996), they may find, as Kakabadse and Parker (1984) argue, that what constitutes valid information is intensely political. Ramirez and Bartunek (1989) describe the situation where, as the insider action researcher started moving the project towards the action planning stage, she was informed that there were rumours among the staff that she was engaging in the research to set up a position for herself. She tried to dispel these rumours by informing the staff of the project's

direction and activities. Her experiences of being the recipient of such political behaviours caught her off guard and were hurtful to her.

A critical political issue for all researchers is sensitivity regarding the publication and dissemination of the research for the third person audience, and insider action research is no exception. The ethical principles associated with working in an action research mode mean that the researcher does research *with* people rather than *on* people. Hence in principle the psychological and formal contract between the researcher and the members of the system is collaborative throughout the process, and so issues regarding publication are dealt with in the context of the authentic collaborative relationships (Rowan, 2000).

As insider action research researchers engage in their project, they need to be prepared to work in the political system, which involves balancing the organization's formal justification of what it wants from the project with their own tacit personal justification for political activity (Buchanan and Badham, 1999). Throughout the project they have to maintain their credibility as an effective driver of change and as an astute political player (Buchanan and Boddy, 1992). The key to this is assessing the power and interests of relevant stakeholders in relation to aspects of the project, while at the same time maintaining the integrity of the relationships (Rowan, 2000).

In her research on ethical decision-making in her own organization, Holian (1999) reported how she felt unprepared for the backlash that resulted from surfacing 'undiscussables' within the organization related to cover-ups, perceived abuses of power, nepotism, harassment, allocation of rewards, and unfair discrimination. While these issues were deeper, and more shocking and troubling than anticipated, she reflected that she was not adequately prepared to look after herself or others when the backlash came. Consequently, she was not able to balance the multiple roles of researcher, senior executive and programme facilitator and, after one last stand-up fight with some of her fellow senior executives, she resigned.

Insider Mechanistic-oriented Action Research

Insider mechanistic-oriented action research illustrates how change may be enacted in an organization and provides valuable case material and contributes to knowledge of how organizations change. For instance, Bartunek et al. (2000) provide good examples of insider mechanistic-oriented action research. They present three cases of management-led action research projects that are oriented towards improving operational action. For example, they describe one such project in a bank on communication problems with clients. Through the action research process of participative data gathering, data analysis, feedback and action planning, intervention and evaluation, the named problem was addressed and improvements made. In a more complex case, they describe a manager-led action research project which initially aimed at improving a manufacturing system by increasing volume while maintaining flexibility as well as enabling automated material control and improved planning. As the data were being analysed, it became evident that these changes would involve creating a radically new way for the company to do business. Accordingly, through the action research cycle, materials personnel, assemblers, testers and supervisors/managers participated in

diagnosis, analysis and feedback resulting in the implementation of a new integrated manufacturing system. So the issue moved from being a first order or single loop issue to a second order or double loop issue.

Insider Organistic-oriented Action Research

Insider organistic-oriented action research is frequently focused on the researcher as a 'reflective practitioner', whereby the researcher engages in an inquiry into his or her own personal and professional practice (Schon, 1983; Marshall, 1999, 2001; Raelin, 2000). In many situations, this inquiry process is privately undertaken and may not be explicit or shared with fellow members of the organization (Coghlan and Brannick, 2001). In situations where the research is a requirement for academic accreditation, such as a doctoral or masters dissertation, the researcher needs to contract with relevant members of his or her organization as to what he or she is doing and, where necessary, be given permission (Coghlan and Brannick, 2001). In all situations it is important to avoid unethical practices whereby one is, in effect, spying on others.

Krim (1988; Bartunek et al., 1999) provides an organistic case example of action inquiry in his own organization. He reports how he, as initiator and coordinator of a new labour-management cooperation programme based on employee participation in a city hall, sought to use himself as the key learning strategy, whereby his management style would be central to the inquiry process. He outlines the context of change in a city hall power culture, and describes both the political and conflictual dynamics within that culture and the processes of his own personal learning. He describes his reflection process in terms of a pyramid of five steps: recording and observing on a daily and hourly basis; weekly selection and analysis of critical incidents; exploration of these issues with his academic supervisor; rehearsal and role playing with his supervisor in anticipation of further critical incidents; and public testing in the real-life situation. He reports how this cycle of continuous rehearsal and performance allowed him to improve his performance in highly political and conflictual situations. From this process he received feedback on his management style, particularly regarding how he tended to 'de-authorize' himself, and so he adopted some practical rules of thumb to help him develop new behaviours. He reports how he was accused of spying as his research notes were pilfered from his computer and circulated around his antagonists. This case is organistic as it deliberately addresses not only the task of implementing the employee participation programme in city hall, but also how the researcher's own personal learning in action was integral to the study.

For the insider action researcher, organistic action research is potentially more difficult in political terms than mechanistic action research. As mechanistic action research is directed toward a pragmatic outcome, the benefit for the organization may be clear and more acceptable, whereas organistic action research is potentially more subversive as it addresses underlying assumptions and defensive routines that members of an organization may feel uncomfortable about being exposed and then may oppose and subvert.

Action research tends to be opportunistic in that the situation being studied is one that is already occurring or being planned, and is not set up specifically for the purpose of the research. Hence action research involves inquiry into real-time

action. Accordingly, the starting point for the insider action researcher is a question about what is happening or being planned, followed by contracting an action research approach to studying the system in action. The opportunistic nature of action research means that the researcher's initial question determines whether a project is mechanistic or organistic. In Bartunek et al. (2000) the concrete operational problems led the practitioners into mechanistic-oriented inquiry into how to resolve them. Krim (1988) elected to use himself as the focus of his inquiry and so opted to follow an organistic-oriented approach.

Can mechanistic- and organistic-oriented action research be combined? While I have presented mechanistic and organistic approaches as distinct within action research, they are complementary and can be utilized together in situations where the pragmatic change agenda is integrally linked to intended self-study in action by the organization. This may occur in a large-scale transformational change project, or in the adoption of a total quality approach where the psychological contract is to create a community of inquiry. An interesting example of the combination of mechanistic and organistic inquiry may be seen in the emerging learning history approach (Kleiner and Roth, 2000; Roth and Kleiner, 2000). Kleiner and Roth (2000) provided a learning history account of an oil company in which the new CEO set the company on a deliberate course of learning and transformation. The change agenda was initiated through an economic model and then moved to issues of governance, structures, relationships, communication, and basic attitudes and behaviour. Fundamental identity and ways of thinking, feeling and acting changed over time. The learning history provides both the observations and reflections on what happened by the participants, and the 'analytic' comments by the external learning historians. In the learning history, participants at all hierarchical levels show their perceptions and experiences of what took place.

Conclusions

Insider action researchers are engaged in first person research, using their pre-understanding of organizational knowledge and organizational studies for their own personal and professional development. They are engaging in second person research by working on practical issues of concern to their organization in collaboration with colleagues and relevant others. They are engaging in third person research by generating understanding and theory that is extrapolated from the experience. Mechanistic- and organistic-oriented forms of action research address all three audiences for research.

In this article I have reflected on insider action research as a relatively neglected form of research on organizations. Insider research is valuable because it draws on the experience of practitioners as complete members of their organizations and so makes a distinctive contribution to the development of knowledge about organizations. Within insider research, action research has a particular contribution to make to organizational research, as it generates useful knowledge about how organizations manage change and key actors perceive and enact their roles with regard to change.

I have identified two distinct patterns of approach within action research. Mechanistic-oriented action research encompasses what is seen as traditional

action research as expressed in organization development and participatory action research, leading to pragmatic outcomes such as the management of change or problem resolution. This is an attractive form of action research from an organization's point of view and one that is readily adopted by many insider action researchers. Organistic-oriented action research is more complex and subversive because it addresses issues of transformation of being and values as behaviour in action is studied and underlying assumptions and values questioned. As distinct approaches, both provide important and useful ways of doing action research in organizations; as complementary or integrated approaches, they enable the deeper aspects of organizational change to be uncovered and researched.

As alternatives to traditional approaches to research become more common, it is useful to reflect on insider action research as an increasing phenomenon within organizational research. Further reflection on and exploration of how active members of organizations engage in action research in and on their own organizations will continue to yield fruit and contribute to the developing experience and knowledge of life in organizations.

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